



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Santee Health Center

End User Remote Training and EHR Go Live

Announcement and Agenda

May 7, 8, 9 & 10 - 2013

IHS Office of Information Technology (OIT)
Aberdeen Area Office, South Dakota
National Indian Health Board (NIHB) Regional Extension Center (REC)
United South and Eastern Tribes (USET) Regional Extension Center
And
Santee Health Center
Niobrara, NE

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1.0 General Information

1.1 Purpose of Training

The Resource Patient Management System Electronic Health Record (RPMS EHR) is a suite of software applications designed to move most clinical transactions from paper-based to an electronic environment. The EHR uses upgrades of existing RPMS applications and clinical data, but provides a graphical user interface (GUI) that facilitates access to and direct entry of this data by clinical users. The two most significant clinical enhancements provided by the EHR are the direct entry of orders (pharmacy, laboratory, radiology, nursing, etc.) by providers, and the on-line documentation of clinical encounter notes. In addition, the EHR will make clinical decision support tools available to providers at the point of care, and will make the medical record immediately accessible to all authorized users.

Implementation and maintenance of an electronic medical record (EMR) at any health care organization is a complex and lengthy process, requiring preparation and changes in essentially all areas of a medical facility. Rolling out an electronic record system at any facility will require a considerable training effort at the time of implementation, as well as an ongoing program of training and support.

This EHR Remote Support Activity is to facilitate EHR related knowledge and EHR Configuration for Ponca Hills Health & Wellness Center.

Disclaimer: There are many RPMS packages (i.e., Reminders, Pharmacy, Scheduling and ICARE) that have separate training sessions. This Remote Activity is focused on the RPMS EHR application. Please see the RPMS Training Web Site for a forthcoming training in your area.

The objective of this Remote Web Conference Support Activity is to train and review the Advanced User Concepts for the Electronic Health Record processes and practices with specific roles in the Clinical Application Coordinator (CACs) area and the EHR Team.

This "virtual" remote support activity will be provided via Remote Web Conference and hosted by the (a) IHS Office of Information Technology and (b) Ponca Hills Health & Wellness Center . The Ponca Hills Health & Wellness Center EHR Team will participate using their own local database. The OIT EHR Consultants will provide support via Web Conference using the educational techniques of lecture, discussion, scripts, and "hands-on" computer experience with the RPMS EHR clinical application.

1.2 Prerequisites

None

1.3 Intended Audience

Physicians, Medical Providers, Nurses, Dentists, Pharmacists, Registered Dietitians, Therapists, Clinical Application Coordinators, GPRA, IPC, and MU Coordinators, Case Managers, Medical Records, and Health Informaticist

1.4 Course Material and References

- Course Agenda (this document)
- EHR Web Site : <http://www.ihs.gov/EHR/>
- EHR/RPMS Enhancement Request:
<http://www.ihs.gov/RPMS/index.cfm?module=feedback&option=add&newquery=1>
- EHR FTP Site: <ftp://ftp.ihs.gov/pubs/EHR/>
- Meaningful Use Site: <http://www.ihs.gov/meaningfuluse/>
- RPMS Training Page: <http://www.ihs.gov/RPMS/index.cfm?module=Training>
- RPMS and EHR Manuals :
<http://www.ihs.gov/RPMS/index.cfm?module=Applications>
- Aberdeen Area Share Point: <http://workgroups.ihs.gov/sites/abr/default.aspx>
- National Plan & Provider Enumeration System:
<https://npiregistry.cms.hhs.gov/NPPESRegistry/NPIRegistryHome.do>

Ponca Hills Health & Wellness Remote Deployment Team

- 1.5 Indian Health Service Office of Information Technology (OIT)
- David R. Taylor MHS, RPh, PA-C, RN - EHR Training and Deployment Manager
 - Deborah Burkybile RN, OIT EHR Training and Deployment Manager
 - Mollie Ayala, MHI, OIT USET EHR Coordinator
 - Catherine Whaley, PMP, EHR Project Manager
 - Janna Morris, OIT USET Lab Consult
- 1.6 Aberdeen Area (ABR):
- Leslye Rauth, CAC, Aberdeen Area Clinical Application Coordinator
 - Jon Schuchardt, PharmD, Aberdeen Area Pharmacy Consultant
 - Heather McClane, MBA, Area Health Information Management Consultant
 - Kathy Bad Moccasin, Aberdeen Area Business Office Manager
 - Dr. Cuny, MD, Aberdeen Area Chief Medical Officer
 - Mary Lynn Eagle Staff, RN, Aberdeen Area Chief Nursing Officer
 - Ron Redwing, Aberdeen Area Tier 2 Support
 - Martin Hall, Aberdeen Area Tier 2 Support
 - Scott Anderson, Aberdeen Area Meaningful Use Consultant
- 1.7 United South and Eastern Tribes (USET) REC:
- Kelly Samuelson, CAC Mentor, USET Contractor
 - PEI Pharmacy Consultant, USET Contractor
- 1.8 Santee Health Center - Team
- Torie Antonie, RN – Director of Nursing/CAC
 - Nicole Koehn, CPC – Medical Records/Coding
 - Pamela Swanson – Co-CAC – Radiology and Laboratory Lead
 - Kevin Lhotka – Laboratory Director
 - Natalie Torrez- Health System Specialist/Business Officer Manager
 - Erin Baumfalk - Pharmacist – EHR Lead
 - Ray Johnson – Chief Pharmacist
 - Derek McKenzie – Site Manager / Co-CAC
 - Dr. Francine Mousseau - Medical Officer
 - Cynthia Redwing, Business Office/Co-CAC

2.0 Learning Objectives

- This hands-on activity provides a review of the RPMS packages and preparation required for EHR implementation. Included in this course, participants are provided with the knowledge, skills, and abilities to fully utilize the EHR and instruct other clinicians in its use and offer participants the tools necessary for setting up the EHR. At the end of this session participants will be able to:
- Provide an overview of the Resource Patient Management System Electronic Health Record (RPMS EHR)
- Review Meaningful Use
- Review RPMS Package Optimization
- Examine the EHR framework
- Define the expectations, roles and responsibilities of the (a) "Clinical Application Coordinator" (CAC), (b) EHR "Super User", (c) Site Manager, (d) RPMS Informaticist, (e) Meaningful Use Coordinator and (f) other EHR Implementation Team Members.
- Review and Troubleshoot:
 - Notifications
 - Allergies & vitals
 - Progress Notes
 - Exams & Health Factors
 - Patient Education
 - Immunizations
 - Consult
 - Problem List
 - Historical Services
 - Family History
 - Parameters
 - Printing
 - Postings
- Review and troubleshoot pharmacy, laboratory, and radiology
 - Order Entry
 - Order Menus
 - Quick Orders
 - Order Checks
- Set up a "User" and "User" management including Person Class and NPI
- Set up a CAC with keys and menu management
- Review and configure Quick Notes
- Demonstrate Fileman – inquire and search

3.0 Detailed Agenda – Time Zone is Central Time

3.1 Day 1

Day 1 – May 7 - Tuesday		
9:00 – 4:30	<p>Welcome and Introductions: All Deborah Burkybile, Leslye Rauth, Kelly Samuelson, Mollie Ayala, Kelly Samuelson, Kathy Bad Moccasin, Mary Lynn Eagle Staff, Dr. Cuny, Heather McClane, Janna Morris, Martin Hall, Jon Schuchardt, Ron Redwing and Catherine Whaley</p> <ul style="list-style-type: none"> • Torie Antonie, RN – Director of Nursing/CAC • Nicole Koehn, CPC – Medical Records/Coding • Pamela Swanson – Co-CAC – Radiology and Laboratory Lead • Kevin Lhotka – Laboratory Director • Natalie Torrez- Health System Specialist/Business Officer Manager • Erin Baumfalk - Pharmacist – EHR Lead • Ray Johnson – Chief Pharmacist • Derek McKenzie – Site Manager / Co-CAC • Dr. Francine Mousseau - Medical Officer • Cynthia Redwing, Business Office/Co-CAC <p>At the end of this session participants should be able to:</p> <ul style="list-style-type: none"> • Provide an Overview of the Multi Divisional Configuration Process 	
	<p>EHR Tab by Tab Tour – Lead by Torie Antonie, Package owners and Leslye Rauth</p> <p>Multi-Divisional Configuration & Test Package Parameter Setup:</p> <ul style="list-style-type: none"> • PCC Master Control File – Derek McKenzie & Kelly Samuelson • Patient Registration - Kelly Samuelson & Kathy Bad Moccasin & Santee Site Lead • Scheduling - Kelly Samuelson & Kathy Bad Moccasin & Santee Site Lead • Adverse Reaction Tracking - Erin Baumfalk & Ray Johnson & Jon Schuchardt • Immunizations - Santee RN – Package Owner & Kelly Samuelson • Pharmacy Menu – Erin, Ray, PIE Staff & Jon Schuchardt • Lab Menu - Janna Morris, Pamela Samson & Ken Lhotka 	
	Lunch will be scheduled according to programmatic needs	

	Medication Management - Erin Baumfalk, Ray Johnson, PEI Staff & Jon Schuchardt <ul style="list-style-type: none"> • Pharmacy Parameters • Paperless Refill Orders and Back door orders • Refills for expired Medications at Pharmacy Window • Outside Medications • Patient Wellness Handout • Medication Reconciliation • Medication Orders • Dental Medication Orders • Control Substance – Mental Health Tribal Program • Medication Administered in Clinic • Printing a Prescription • Pharmacy Unique Scenarios • Locum Pharmacist • Pharmacy Keys • Pharmacy Education Button • Pharmacy Note Titles and Templates • Pick List – POV, CPT and Education • AAO TIU Reminder Dialogs • Pharmacy Related Reminders Wrap Up and Review	
Day 2 – May 8 – Wednesday		
9:00 – 4:30		
	EHR Configuration <ul style="list-style-type: none"> • ICD-9 and CPT Pick Lists – Kelly Samuelson & Nicole Koehn • Immunization CPT Pick List Association – Deborah & Torie • Education Pick List - Deborah Burkybile & Torie Antonie • Vital Intake Template – Deborah Burkybile and Santee Nursing Staff • Chief Complaint - Deborah Burkybile & Torie Antonie • Text Integration Utility – Deborah Burkybile & Torie Antonie • Notes, Note Titles, and Business Rules - Kelly Samuelson & Santee HIM lead • Quick Notes – Leslye Rauth & Torie Antonie • Consults Santee and Tribal Behavioral Health – Leslye & Torie • RCIS Package - Natalie Torrez and Deborah Burkybile EHR Orders Configuration – Review Meaningful Use Report <ul style="list-style-type: none"> • CPRS and Orders - Deborah Burkybile • Laboratory Menu – Review • Radiology Menu – Review • Nursing Orders – Review • Pharmacy Orders - Review 	
	Lunch will be scheduled according to programmatic needs <ul style="list-style-type: none"> • Laboratory - Janna Morris & Pamela Swanson 	

	<ul style="list-style-type: none">○ BLR Master Control File○ Quick Orders & Quick Order Menus○ POC Tests○ Taskman Settings○ Accession Areas	
	Wrap Up and Review	
Day 3 – May 9 – Thursday		
9:00 – 4:30	Visit - Start to Finish Deborah Burkybile, Dr. Mousseau and Torie – Lead All	
	Nurse & Provider Training – AM and PM Session (Repeat)	
	<ul style="list-style-type: none">• Setting Individual Defaults – Patient List, Note titles and Note View• Patient Registration & Check In• Notifications• Selecting Patient• Documentation of Chief Complaint• Vital Signs• Tobacco and Alcohol Assessment• Domestic Violence/Intimate Partner Violence Screening• Depression Screening• Reproductive Factors• Growth Chart and Infant Feeding• Medication Reconciliation• Adverse Reactions• Review Box – Problem list, allergies and medications (Consider persons without)• Immunization Update• History & Physical• Problem List & POV & Active Problems (Education “I”nformation button)• Treatment Plan• Laboratory Orders• Medication Orders• Radiology/Imaging Orders• Nursing Orders• Note title and template selection• Additional Signature• E&M and CPT Coding• Consults• Reminders	
Day 4 – May 10 – Friday		
9:00 – 4:30	Providers and Nurse Go Live in EHR – Dr. Mousseau and Torie Delineate process	
	Coding Queue Review - Kelly Samuelson & Kathy Bad Moccasin <ul style="list-style-type: none">• PCC Data Entry - Kelly Samuelson & Kathy Bad Moccasin & Nicole Koehn• Behavioral Health – Services	